

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: LEVEL OF SERVICE STANDARDS

ITEM NUMBER: 7

ATTACHMENT: 1

ACTION: _____

DATE OF MEETING: January 6, 2000

INFORMATION: X

PRESENTER(S): Mr. Carter

EXECUTIVE SUMMARY

The Level of Service report provides the Benefits and Services Committee with the necessary information to fulfill its oversight responsibility regarding the delivery of benefits and services to CalSTRS members. The following reports for the month of November 1999.

I. Overview

- A. Fiscal Year Allowance Roll: CalSTRS paid 163,054 benefit recipients a total of \$279,221,472 in November 1999. The average monthly allowance roll for FY 1999/2000 is \$276,841,372. Total disbursements for this fiscal year are \$1,384,206,861.
- B. Service Levels: All programs are performing within acceptable variance levels. Staff performance is high, especially in light of efforts directed to START legislation implementation and other strategic projects.
- C. Application Volume: An overall increase of eleven percent in comparison to the same period last fiscal year.
- D. Interest Payments: The total interest payment volume for November 1999 increased nine percent as compared to November 1998. The dollar amount of interest paid decreased 62 percent.

II. Individual Program Reports: Pages 1-7

III. Miscellaneous Items: Pages 8 and 9

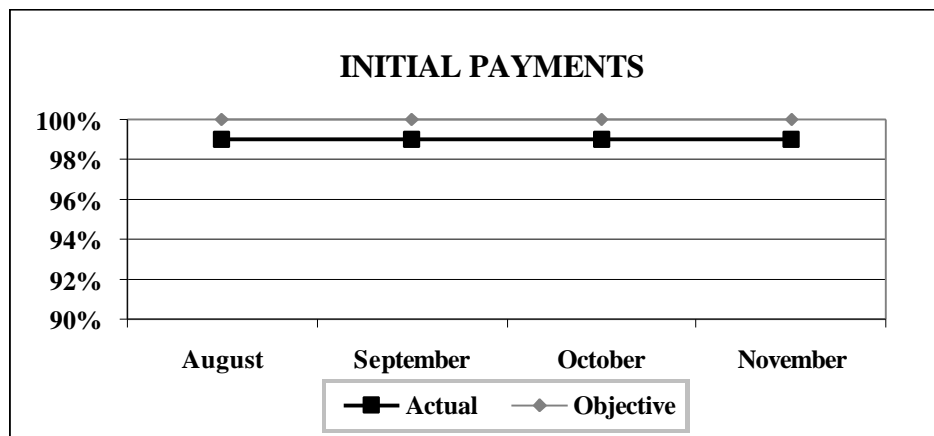
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Service Retirements

Objective Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.

Application Volume Change Plus six percent in comparison to same period last fiscal year.

Baseline FY 1998/99 actual: 99 percent

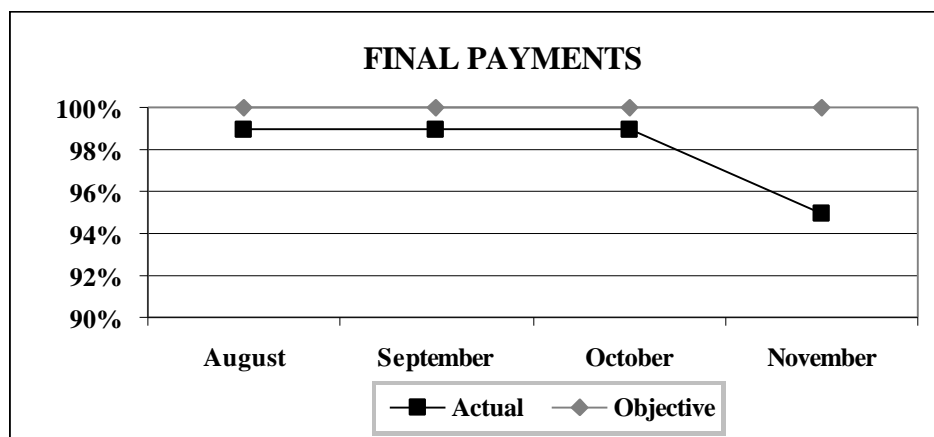


Period	August	September	October	November	Year to Date Average
Actual	98%	99%	99%	99%	99%
Objective	100%	100%	100%	100%	

Objective Process 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.

Interest Payments July 1999 – November 1999
Number of Payments: 191
Dollar Amount: \$1,114

Baseline FY 1998/99 actual: 98 percent



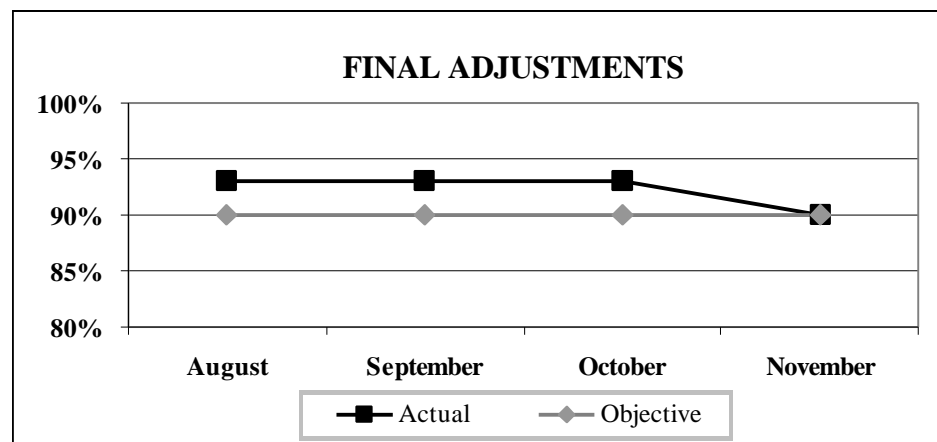
Period	August	September	October	November	Year to Date Average
Actual	99%	99%	99%	95%	98%
Objective	100%	100%	100%	100%	

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Service Retirements

Objective Finalize 90 percent of all payments within four months of the retirement effective date.

Baseline FY 1998/99 actual: 91 percent



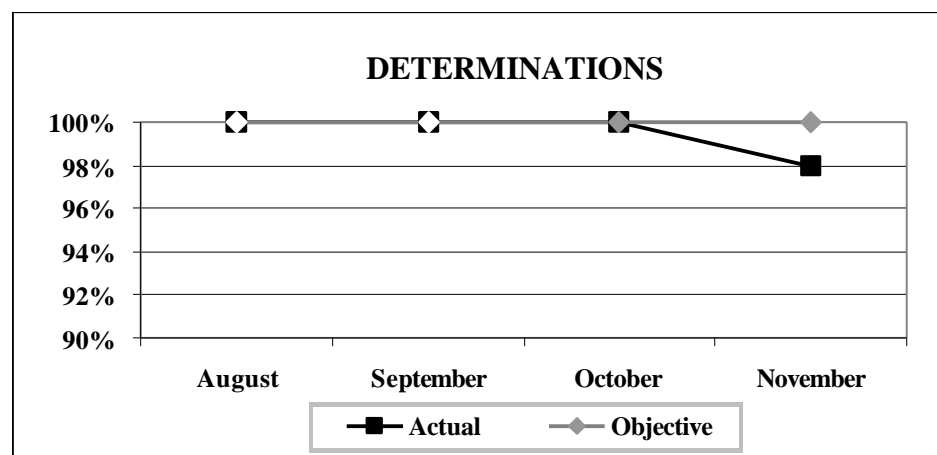
Period	August	September	October	November	Year to Date Average
Actual	93%	93%	93%	90%	93%
Objective	90%	90%	90%	90%	

Disability

Objective Process 100 percent of all eligible applications within 180 days of receipt.

Application Volume Change Plus eight percent in comparison to same period last fiscal year.

Baseline FY 1998/99 actual: 99 percent

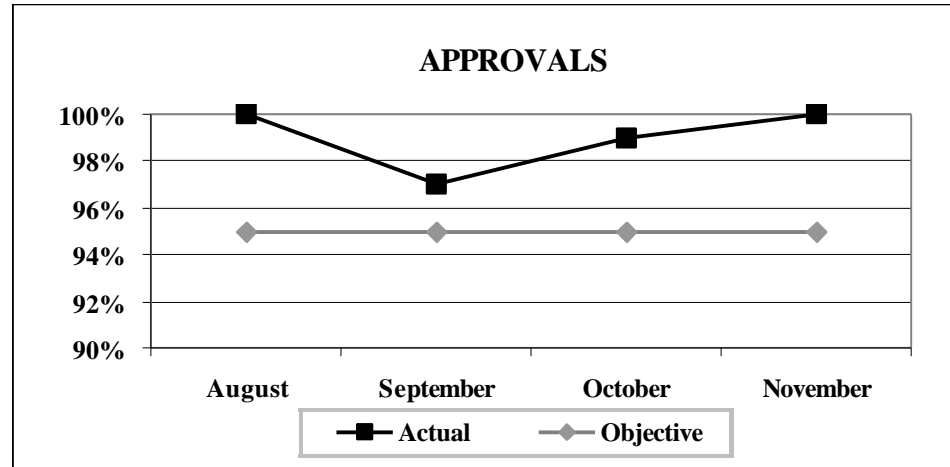


Period	August	September	October	November	Year to Date Average
Actual	100%	100%	100%	98%	100%
Objective	100%	100%	100%	100%	

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Disability

Objective Process 95 percent of all approvals within 30 days of receipt of all necessary information.

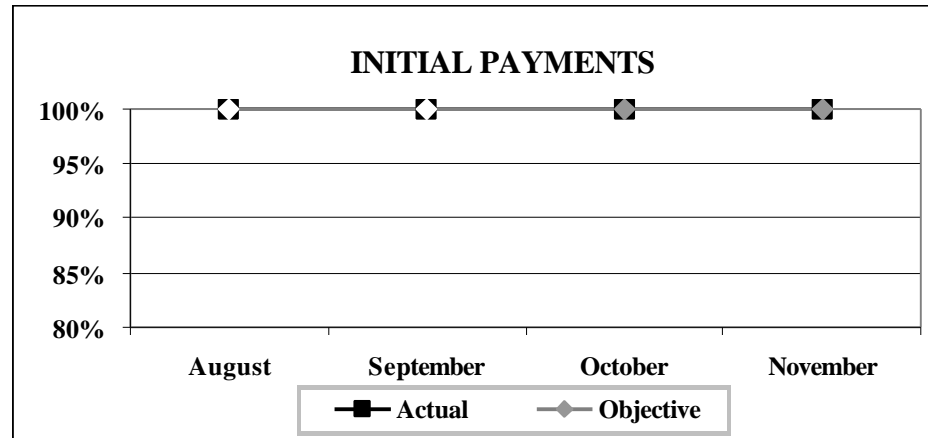


Baseline FY 1998/99 actual: 100 percent

Period	August	September	October	November	Year to Date Average
Actual	100%	97%	99%	100%	99%
Objective	95%	95%	95%	95%	

Objective Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information.

Interest Payments July 1999 – November 1999
Number of Payments: 0
Dollar Amount: \$0



Baseline FY 1998/99 actual: 100 percent

Period	August	September	October	November	Year to Date Average
Actual	100%	100%	100%	100%	100%
Objective	100%	100%	100%	100%	

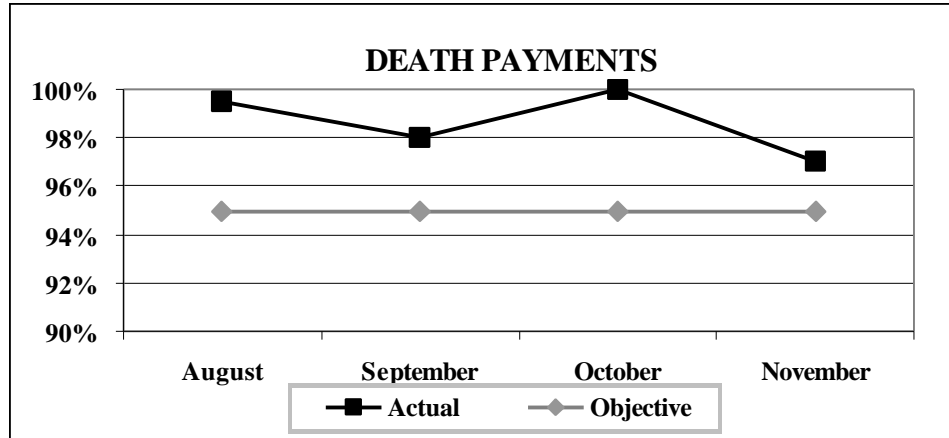
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Survivor Benefits

Objective Process 95 percent of all applications within 30 days of receipt of all necessary information..

Application Volume Change Fifteen percent increase in comparison to same period last fiscal year.

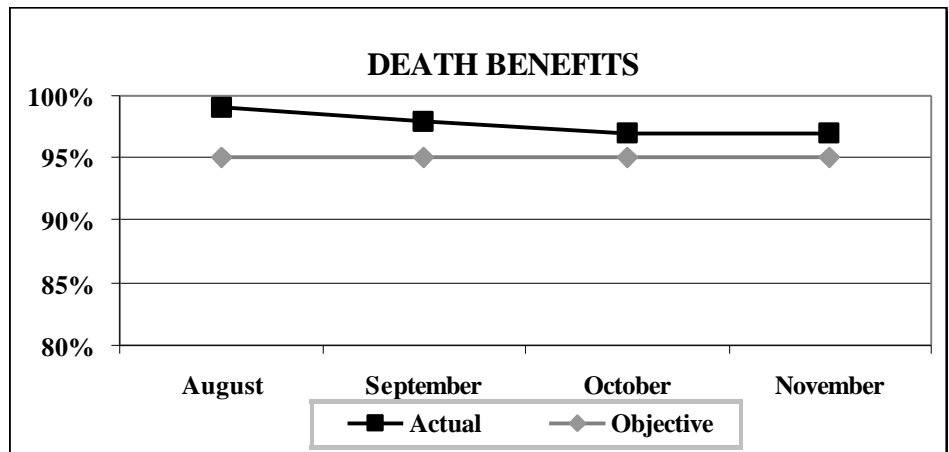
Interest Payments July 1999 – November 1999
Number of Payments: 86
Dollar Amount: \$2,153



Baseline FY 1998/99 actual: 97 percent

Period	August	September	October	November	Year to Date Average
Actual	99.5%	98%	100%	97%	99%
Objective	95%	95%	95%	95%	

Objective Complete 95 percent of all payments for retired members within 90 days of receipt of notification of death.



Baseline FY 1998/99 actual: 93 percent

Period	August	September	October	November	Year to Date Average
Actual	99%	98%	97%	97%	97%
Objective	95%	95%	95%	95%	

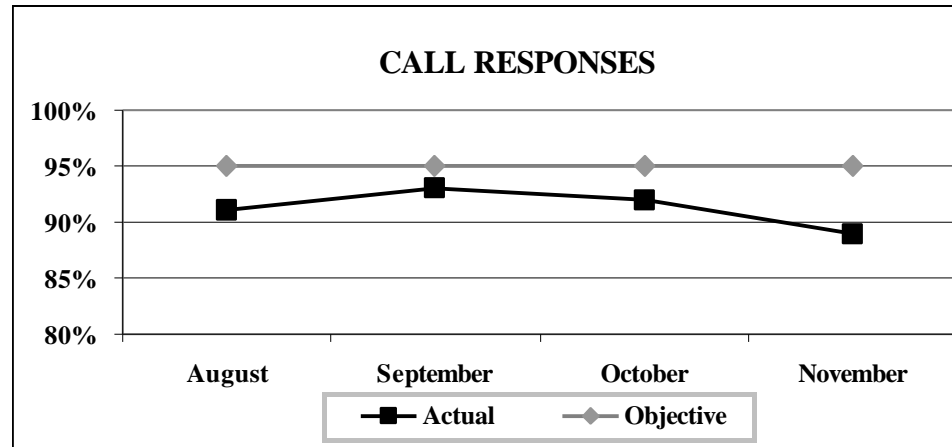
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Public Service

Objective Answer 95 percent of all calls in less than three minutes.

Volume Change 8.95 percent decrease.

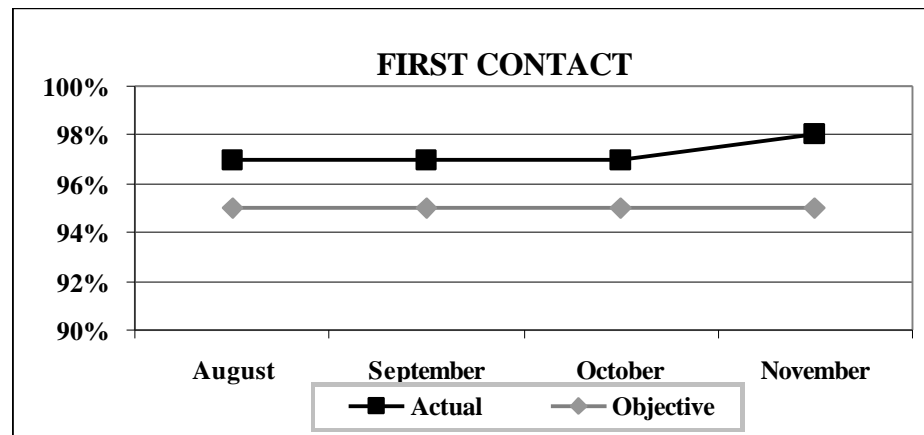
Notes Average queue time: 76 seconds
Longest queue wait: ten minutes



Baseline FY 1998/99 actual: 94 percent
FY 1996/97 Objective:
75 percent/less than three minutes.

Period	August	September	October	November	Year to Date Average
Actual	98%	93%	92%	89%	91%
Objective	95%	95%	95%	95%	

Objective Answer 95 percent of all calls on the first contact.



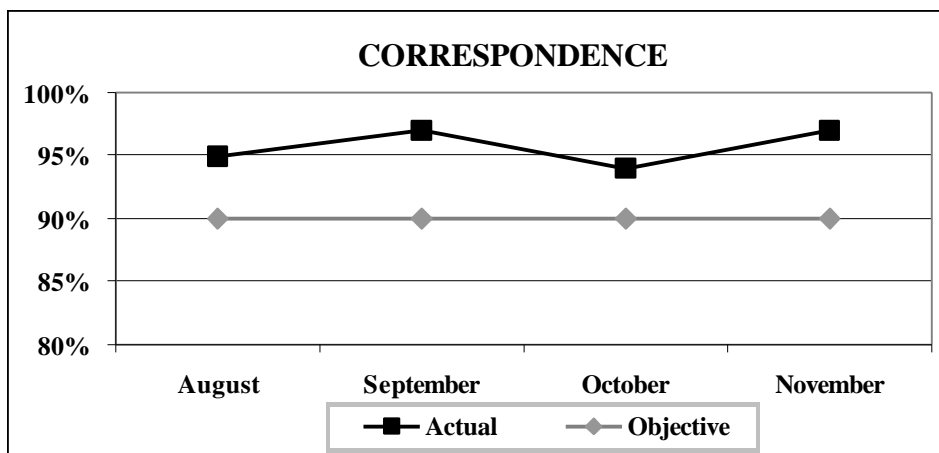
Baseline FY 1998/99 actual: 98 percent

Period	August	September	October	November	Year to Date Average
Actual	97%	97%	97%	98%	97%
Objective	95%	95%	95%	95%	

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Public Service

Objective Respond to 90 percent of all correspondence in ten working days.

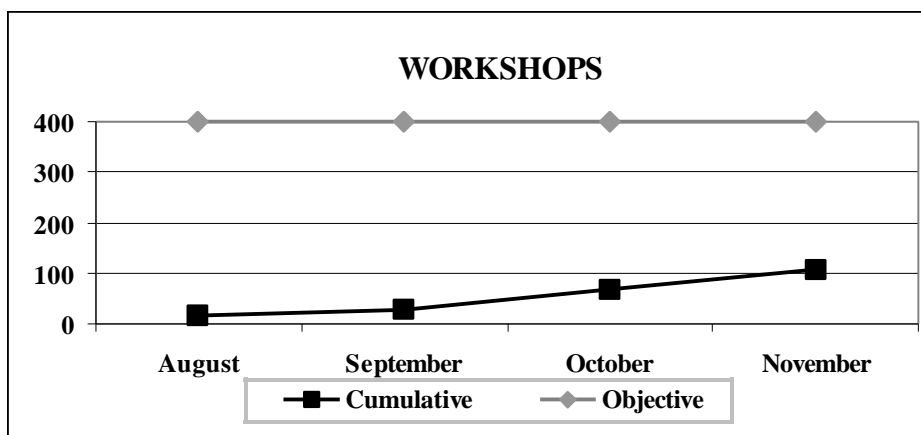


Baseline FY 1998/99 actual: 94 percent

Period	August	September	October	November	Year to Date Average
Actual	95%	97%	94%	97%	95%
Objective	90%	90%	90%	90%	

Regional Counseling Services

Objective Conduct 400 workshops



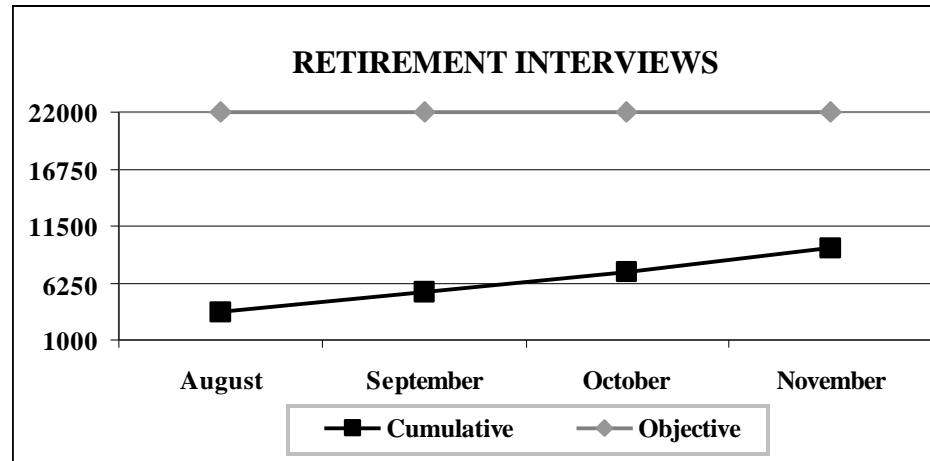
Baseline FY 1998/99 actual: 491

Period	August	September	October	November	Fiscal Year Total
Actual	14	39	78	117	106
Objective	400	400	400	400	

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Regional Counseling Services

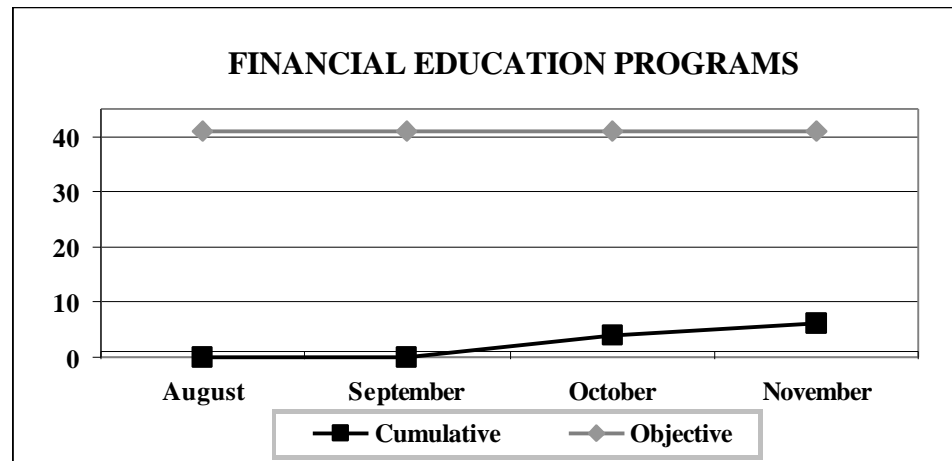
Objective Provide 22,000 retirement interviews.



Baseline FY 1998/99 actual: 24,657

Period	August	September	October	November	Fiscal Year Total
Actual	1,930	1,837	1,715	2,241	9,436
Objective	22,000	22,000	22,000	22,000	22,000

Objective Deliver 41 Financial Education Program to CalSTRS members.



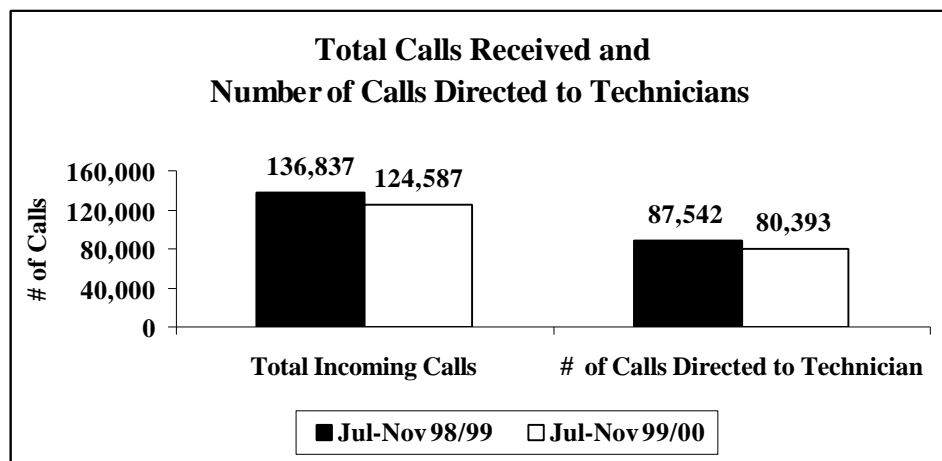
Baseline FY 1998/99 actual: 32

Period	August	September	October	November	Fiscal Year Total
Actual	0	0	4	2	6
Objective	41	41	41	41	41

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

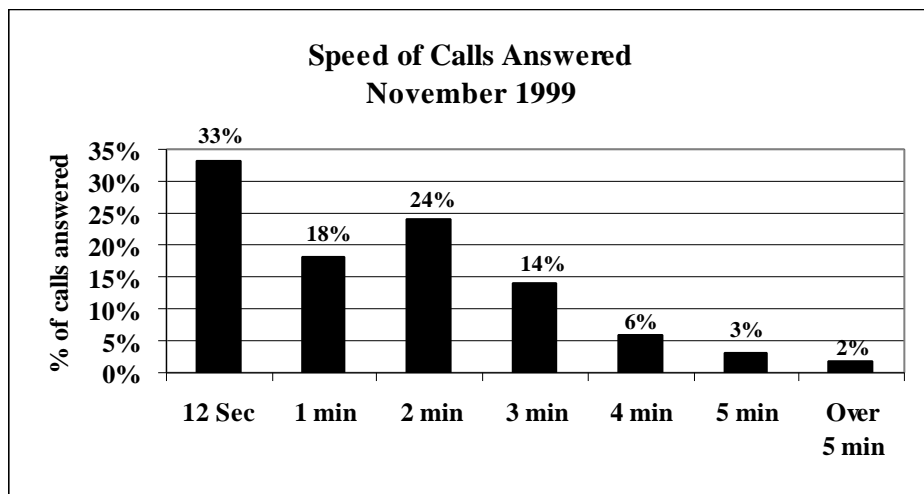
III. Miscellaneous

- A. Outstanding Survivor Benefit Cases:** The Education Code requires a report to the Board on outstanding Survivor Benefit cases not paid within six months of the notification of death. As of November 1999, there were 76 cases beyond the six-month threshold. In October 1999 there were 49 cases, while in September 1999 there were 37 cases exceeding the threshold.
- B. One-Year Final Compensation:** During the current fiscal year, one new school has chosen to participate in this program.
- C. Golden Handshake:**
- | | |
|----------------------|----------------------------------|
| July - November 1998 | 143 districts / 115 participants |
| July - November 1999 | 69 districts / 69 participants |
- D. Telephone Center:**



CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

D. Telephone Center: (continued)



Type	(1) Benchmark 90/91	(2) July-Nov 98/99	(3) July-Nov 99/00	% of Change $\frac{(3) - (2)}{(2)}$	November 1999
Total Incoming Calls	195,858	136,837	124,587	-8.95%	29,311
Technician Calls	117,913	87,542	80,393	-8.17%	16,061
Automated Attendant Calls	31,895	32,877	28,729	-12.62%	6,739
Teletalk Calls	46,050	16,418	15,465	-5.80%	6,511